



COUNTY OF SAN DIEGO
Great Government Through the General Management System – Quality, Timeliness, Value
DEPARTMENT OF HUMAN RESOURCES

CLASS SPECIFICATION

CLASSIFIED

RETIREMENT ASSISTANT DIRECTOR, MEMBER SERVICES

Class No. 007566

■ CLASSIFICATION PURPOSE

To manage and administer retirement benefits to members of the San Diego County Retirement Association (SDCERA) in accordance with the County Employees Retirement Law of 1937 and federal law governing qualified plans and the Retirement Board, county and state policies; and to perform related work.

■ DISTINGUISHING CHARACTERISTICS

Under administrative direction, the incumbent is responsible for highly complex special assignments, operational analysis and evaluation, project management, strategic planning, and management of the daily administration of SDCERA's benefit programs.

■ FUNCTIONS

The examples of essential functions listed in the class specification(s) are representative but not necessarily exhaustive or descriptive of any one position in the class(es). Management is not precluded from assigning other related functions not listed herein if such functions are a logical assignment for the position.

Essential Functions:

1. Manages, directs, plans, coordinates, and organizes retirement operations, programs, and projects.
2. Develops and administers operations plans and policies.
3. Establishes and defines new guidelines and procedures as required.
4. Reviews and interprets current, new or pending legislation affecting SDCERA.
5. Directs preparation of member services budget and monitors status.
6. Develops strategic plan and sets goals.
7. Confers with counsel and assists with the preparation of cases for litigation.
8. Provides courteous, high quality service to members of the public by personally responding to requests for service or making appropriate referral.
9. Investigates and prepares reports and recommendations for action on highly complex operational issues.
10. Conducts major projects, investigations, studies, and other matters that may be confidential; may coordinate and supervise the work of staff who assist in such activities.
11. Directs staff in the development of performance measures pertaining to accuracy and consistency of information given to members, program efficacy, and timeliness of work produced.
12. Directs the development, execution, monitoring, and evaluation of policies and procedures related to member services to ensure quality.
13. Organizes and directs compliance activities to ensure consistency and adherence to applicable laws and regulations.
14. Plans, develops, and leads process improvement initiatives to improve member services, reduce costs, and to automate and streamline functions.

■ KNOWLEDGE, SKILLS, AND ABILITIES

Knowledge of:

- County Employee Retirement Act of 1937.
- Current Federal and State laws, rules, and regulations governing pension benefit systems.
- Retirement plan administration and accounting requirements.
- Retirement administration and information systems.
- Current issues, trends, legislation, and management theories related to benefit plan administration.
- Principles and theory of public administration including general administration, human resource management, and fiscal management.
- Fiscal, actuarial, and budgetary principles and procedures.
- Employer group health insurance.
- Basic information technology systems (i.e. Microsoft Office, Internet).
- Customer service objectives and strategies.

Skills and Abilities to:

- Implement strategic goals and objectives.
- Analyze and interpret current and proposed legislation related to pension management.
- Prepare correspondence, reports, narratives, fiscal and budget documents.
- Make presentations to public officials, board members, managers and the general public.
- Monitor and authorize financial transactions and expenditures.
- Supervise, train, and evaluate the work of subordinate staff.
- Establish and maintain effective working relationships with those contacted during the course of work.
- Design, schedule and implement new benefit programs, policies and procedures.
- Prepare, analyze and research data to draw conclusions and make recommendations.
- Interpret and explain complex retirement-related regulations, policies and procedures.
- Communicate effectively with a variety of individuals representing diverse cultures and backgrounds and function calmly in adverse situations, which require a high degree of sensitivity, tact and diplomacy.
- Treat County employees, SDCERA members, public officials, representatives of outside agencies, and members of the public with courtesy and respect.
- Provide prompt, efficient, and responsive service.
- Exercise appropriate judgment in answering questions and releasing information; analyze and project consequences of decisions and/or recommendations.

■ EDUCATION/EXPERIENCE

Education, training, and/or experience that demonstrate possession of the knowledge, skills and abilities listed above. Examples of qualifying education/experience are: a bachelor's degree from an accredited college or university in business administration, finance, economics, accounting, or a closely related field, AND

1. Six (6) years of retirement/pension plan benefit administration experience, AND two (2) years of supervisory experience, OR
2. Four (4) years of experience as a Retirement Member Services Manager with SDCERA or equivalent position with a California public pension system such as CERS, PERS, or STRS.

Notes: Professional designation as a Certified Employee Benefits Specialist (CEBS) is desirable and may substitute for up to one year of benefit administration experience. Additional years of qualifying experience may substitute for the education requirement on a year-for-year basis.

■ ESSENTIAL PHYSICAL CHARACTERISTICS

The physical characteristics described here are representative of those that must be met by an employee to successfully perform the essential functions of the classification(s). Reasonable accommodation may be made to enable an individual with qualified disabilities to perform the essential functions of a job, on a case-by-case basis.

Continuous upward and downward flexion of the neck. Frequent: standing, sitting, bending and stooping, twisting of waist, side-to-side turning of neck; fine finger dexterity to operate keyboards and writing materials.

■ SPECIAL NOTES, LICENSES, OR REQUIREMENTS

License

A valid California class C driver's license, which must be maintained throughout employment in this class, is required at time of appointment, or the ability to arrange necessary and timely transportation for field travel. Employees in this class may be required to use their own personal vehicle.

Certification/Registration

Completion of Certified Employee Benefits Specialist program is highly desirable.

Working Conditions

Office environment; exposure to computer screens.

Background Investigation/Conflict of Interest Statement

Must have a reputation for honesty and trustworthiness. Misdemeanor and/or felony convictions may be disqualifying depending on type, number, severity, and recency. Prior to appointment, candidates will be subject to a background investigation.

Probationary Period

Incumbents appointed to permanent positions in this class shall serve a probationary period of 12 months (Civil Service Rule 4.2.5).

New: July 28, 2000
Reviewed: Spring 2003
Revised: June 15, 2004
Revised: March 28, 2005